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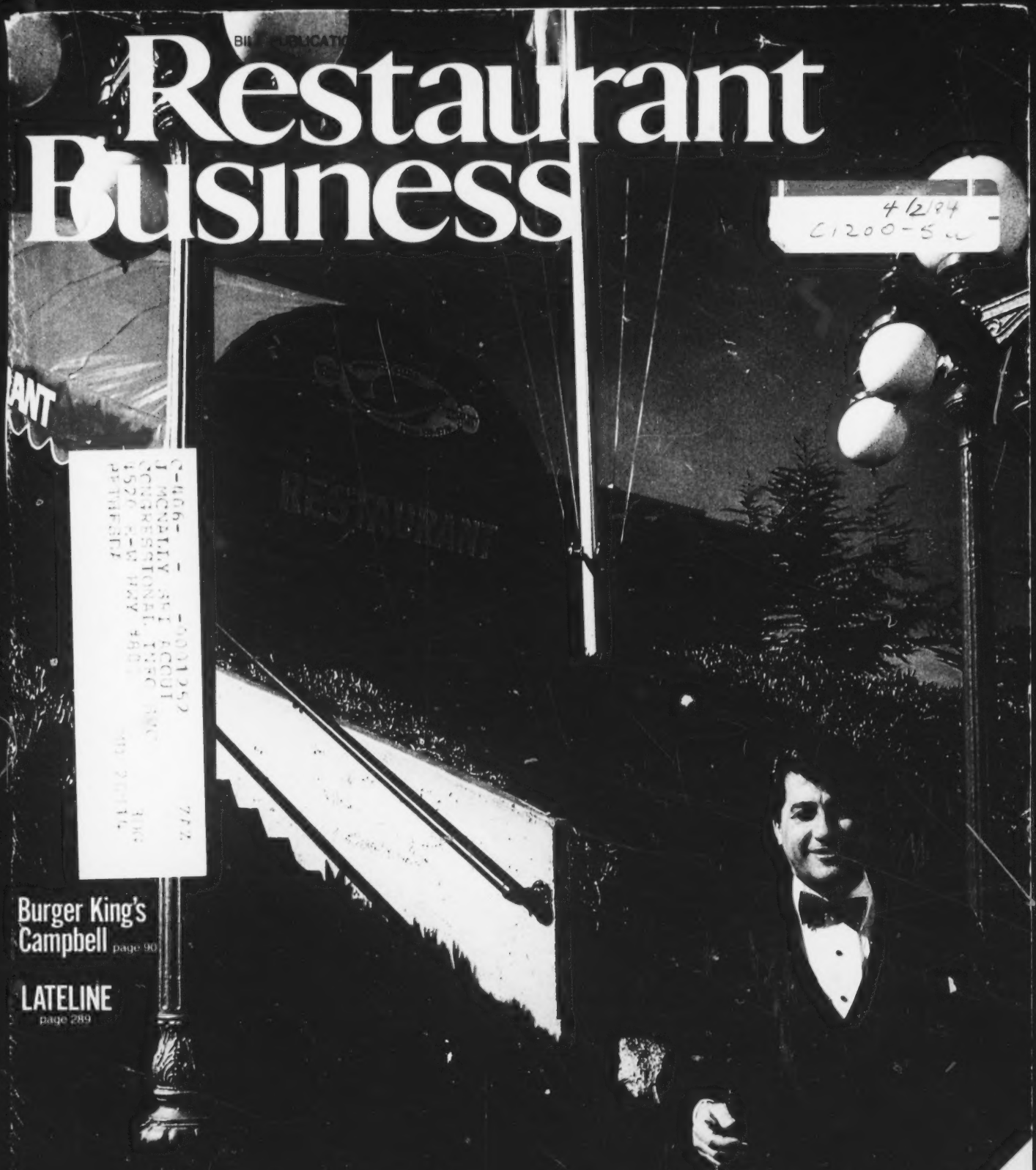

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Restaurant Business

April 10, 1984 VOL. 83, NO. 6

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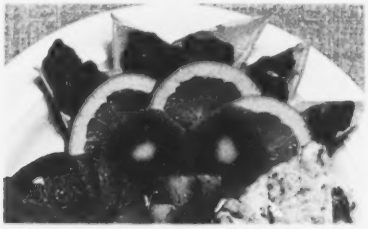

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Cover Photo by Don Gruber

Sizzling Fajitas are popular at W.R. Grace's El Torito.

Mexican menus invade American markets

by Jacque Kochak

Mexican mania is sweeping the country. Staid New England cities are warming up to salsa, and popular Mexican restaurants are showing up in such quintessentially southern cities as North Carolina's Chapel Hill.

Mexican food is indigenous to an arc of southwestern states from Texas to California, where Mexican immigrants introduced their distinctive ingredients and recipes. But in the last few years this unique food has captured fans thoughout the country.

Besides the rapid growth of Mexican food and the spread into new regions, restaurateurs are seeing changes in the level of customers' sophistication about Mexican food.

"We're seeing the same traditional Mexican items growing in popularity as new people are introduced to Mexican food, but as their tastes mature they look for more upscale items," says Bob Anderson, vice-president of marketing for Casa Gallardo, a 30-unit dinner house chain owned by General Mills. "The Taco Bell version of a taco is fine for getting acquainted and will continue to be popular, but a customer who likes Mexican food soon learns there is more."

Indeed, there is more. Mexico boasts 17 different regional varieties of cooking, as well as different levels. Anyone who dismisses Mexican food as junk food is unaware of the subtly-flavored seafood dishes of the Pacific coast or the cooking of the Yucatan, where descendents of the Mayans wrap food in banana leaves and broil it in open pits.

They are also uneducated about the levels of Mexican food, ranging from the ever-popular "finger foods" like tacos, burritos, enchiladas, and tamales, classified as "Tex-Mex," on up to "La Cocina Grande," or haute cuisine influenced by European cooking but subtly blending such indigenous Mexican foods as beans, chilies, avocados, sesame seeds, cocoa and vanilla beans, tomatoes, mangoes, and turkey. The Spanish added their own onions, garlic, rice, nuts, and olive oil.

In between is the kind of food that middle-class Mexican families eat at home, now showing up on more and more Mexican menus. Examples include meat and chicken dishes covered with a mole sauce (a chili sauce often including unsweetened chocolate) or in the form of a guiso (soup).

Sauces are very common and Mexican sauce-making is a fine art. For instance, Il Grande Mole calls for 27 ingredients, ranging from five kinds of chilies to almonds, pecans, peanuts, avocados, raisins, peppercorns, cinnamon, cloves, and

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El Chico's Mama's Taco Salad is served in a deep-fried shell.

Taco Time has added the "Casita Burrita" to its menu.

unsweetened chocolate.

The restaurateur serving Mexican entrees should beware, however, of over-judging the customer's level of sophistication. What's popular in Phoenix may not play in Peoria because customers often have a fixed idea of what is Mexican food and what is not, though that perception may have little to do with the truth. If they see chicken with chocolate sauce when they are expecting the ever-popular deep-fried chimichanga, they may head for the door.

That's why El Torito, a chain of 119 Mexican restaurants owned by W. R. Grace and headquartered in California, offers different menus for different areas. "In the Midwest and Northeast our menu is very limited and focuses on core items," says Fred LeFranc, El Torito's vice-president of operations and marketing. "On the West Coast and in areas where the market has matured, we offer more specialty items, with a variety of meats, chicken and seafood."

Le Franc notes that some larger markets mature very quickly, even if Mexican food is new to the palate. He mentions Chicago, New York, and Boston as rapidly maturing markets. "It is difficult to say how long it will be before we offer a more sophisticated menu in markets like Lexington, Louisville, Seattle, or Eugene, however," he says. "As we see customer frequency increasing, we start offering specialties. That can take anywhere from one to three years."

Acapulco y Los Arcos, another California-based chain, found out the hard way that tastes differ radically from region to region. The chain is noted for its innovative and refined approach to Mexican cooking; founder Ray Marshall was the first chef ever to win a Gold Medal for Mexican cooking at the World Culinary Olympics. Several units were opened in the Midwest in 1982, then promptly closed in 1983. Part of the problem was the units' distance from home-base, where operations could not be monitored on a day-to-day basis. And, Acapulco y Los Arcos found itself faced with a bigger educational job than it chose to pursue.

"Though we have the tacos and enchiladas, we also have some very subtle, delicate seafood dishes that *are* Mexican, but the people in the Midwest didn't perceive them as Mexican," says Karen Mathison, director of marketing. "What they expected and what we offered were two different things."

Despite the growing popularity of Mexican food, it is still a rarity in some parts of the country. The Restaurant Consulting Group's RECOUNT study showed only 94 Mexican restaurants in New England, for a total of only 0.6 percent of all restaurants. The heavily populated Middle Atlantic states fared little better, with only 390 Mexican

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Top 10 Mexican Chains
(Based on Systemwide Sales)

Company	No. of Units*	1983 Sales** *(millions)*	Avg. Unit Volume**
Taco Bell	1,163	$577.2	$400,000
Chi-Chi's	92	$198.5	$2.7 million
El Torito	119	$194.4	$1.8 million
El Chico	85	$ 80	$1.1 million
Taco Time	246	$ 79.9	$299,000
Taco John	352	$ 79.7	$240,000
Del Taco Inc.	180	$ 65.3	$380,000
Monterey House	85	$ 61.5	$741,000
Del Taco Corp.	120	$ 45.6	$380,000
Casa Gallardo	30	$ 45.6	$1.9 million

**Unit data as of Feb. 1984*

***Sales data based on year-end sales and estimated by* Restaurant Business

Unusual offerings at Pepe's in Chicago include Guisado de Res, or beef stew.

Combination platters like this one at Pepe's are top sellers everywhere.

outlets or 0.9 percent of total restaurants. That contrasts with the Pacific states, where there are almost as many Mexican outlets as there are hamburger outlets. Mexican restaurants comprise 8.2 percent of the market with 3,869 units, compared to hamburgers at 8.6 percent of the market with 4,080 units. Yet some observers say that even the California market isn't saturated with Mexican restaurants, though there's one on almost every corner.

RE-COUNT says there are 1,314 Mexican restaurants in the Mountain states, making Mexican the third most popular type of food there behind hamburgers and pizza. The West/South Central region, birthplace of Tex-Mex, boasts 2,543 Mexican eateries, for 6.4 percent of the market. All told, there are 11,352 Mexican restaurants in the entire U.S., for 3.8 percent of the market.

Independents are still very important in the Mexican food segment, though fast food, especially, has seen the rise of some extremely successful chains. Several Mexican dinnerhouse chains are expanding as well.

However, only a modest 30 percent of Mexican restaurants are part of franchise systems. We say modest, because that compares to 77 percent of hamburger and other sandwich restaurants, 83 percent of chicken restaurants, and 41 percent of pizza restaurants.

In 1983, there were 3,374 Mexican outlets that were part of franchise systems, a 45 percent increase over 1978's total of 2,329. Their sales increased in the same period from $602.4 million to $1.5 billion, a skyrocketing 149 percent. Of that total, 1,505 were company-owned in 1983 and 1,869 were franchisee-owned.

Though the chains are definitely a presence in some of the more mature markets like California and Texas, it is in many cases the independents who are introducing the public to the refinements and nuances of Mexican cooking. "I think everyone is watching the hot independents because they are the most innovative," says Dick Huston, vice-president of marketing for El Chico Corp., a chain of 85 dinner houses in the South and Southwest. "We watch what the independents are selling a lot of, then we test it. As the consumer gets more sophisticated, we see popular independents like Javier's and Raphael's here in Dallas selling a lot of chicken and fish. We'll always keep our basic Tex-Mex, but we will clearly have to evolve."

These Mexican independents are no longer inexpensive taquerias on the wrong side of the tracks. Though many are still owned by Mexican immigrants or their descendents, they have benefited from—or helped create—the public's hunger for Mexican cuisine. Restaurants like Las Mañanitas in San Francisco, Las Casuelas in Palm Springs, Mérida in Houston, Fonda San Miguel in Austin, Cafe Cancun in Dallas, Su Casa in La Jolla, and Carlos & Charlie's in L.A. are bastions of style.

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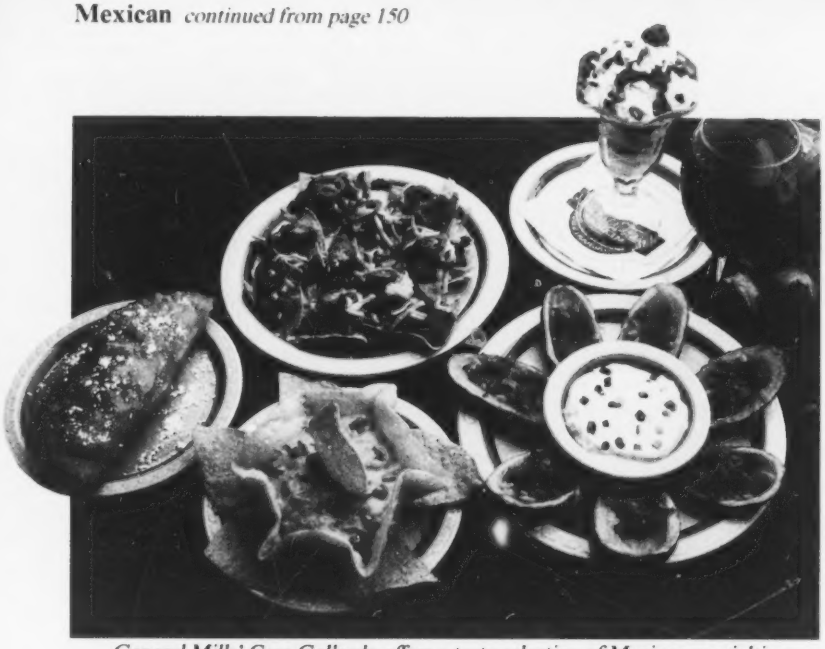

General Mills' Casa Gallardo offers a tasty selection of Mexican specialties.

One example is Casa de Bandini in San Diego's historic Old Town. The restaurant opened in a dilapidated Spanish-era home, and owner Diane Powers filled it with an extensive selection of art and antiques.

The enormous restaurant seats almost 600 people during the summer months, and manager Jaime Cañedo says 90 percent of them are Americans. They are drawn by a menu that includes such specialties as camarones al mojo de ajo, or butterflied shrimp grilled in a light garlic, pepper, and cilantro sauce and served on a bed of rice, and Especial de San German, which combines seasoned shrimp sautéed in butter and brandy with a creamy wine sauce accented by an orange flavored liqueur. The price range is from $3.75 to $9.50, and Cañedo notes that sales just keep going "up and up."

Powers also owns the Casa de Pico, another Mexican restaurant nearby in Old Town's Bazaar del Mundo. Here, the menu is served to a mix of tourists and locals on a patio amid bright umbrellas.

Even outside the Mexican food belt independents are important, and sometimes they are pioneers. Su Casa in Chicago is an institution. Gonzales & Gertrude's is popular in Memphis, as is Los Cunados in Nashville.

In Chapel Hill, N.C., the adventurous tastes of a college population prompted owner Rick Suberman to open Papagayo in 1978. Another unit opened in Raleigh nine months later, a third in Kill Devil Hills on the Outer Banks in 1981, and a fourth in Winston-Salem in 1983. Vice president of operations Henry Schliff notes that additional expansion is being planned.

Schliff adds that Mexican food was fairly unfamiliar when the first Papagayo opened, but because Chapel Hill has an affluent, educated, well-traveled population, Suberman decided to take the chance.

Papagayo eschews traditional Mexican decor for a light, airy atmosphere with a natural wood bar, fan lamps, and wicker chairs. Average dinner check ranges from $8 to $10 with drinks.

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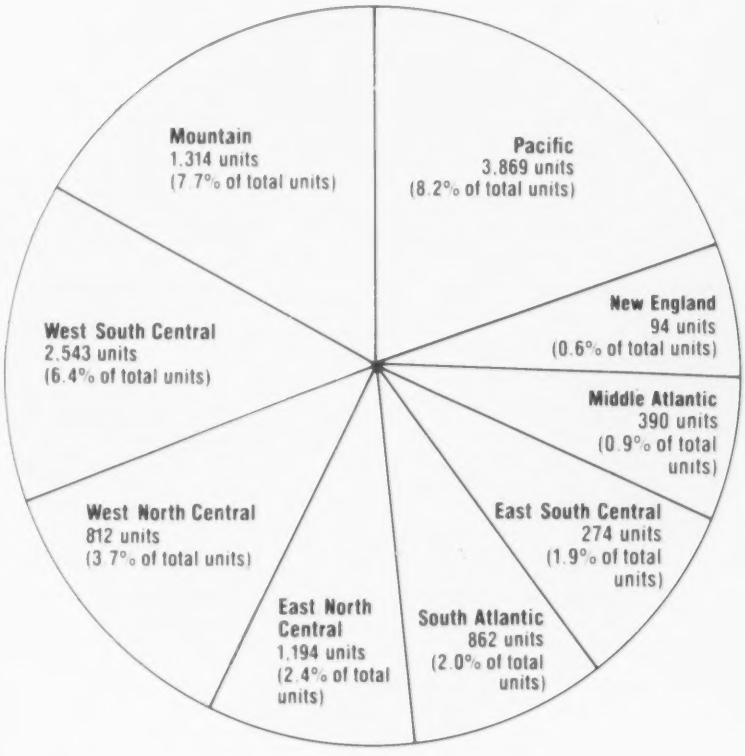
U.S. Mexican Restaurants



11,352 total U.S. units
(3.8% of total U.S. restaurants)
Source: Restaurant Consulting Group RE/COUNT, Spring 1983

Pepe's is positioned between Taco Bell and Chi-Chi's, with emphasis on families.

Schliff, whose background is in French cooking, takes pride in the quality of Papagayo's food. "We don't have a lot of sophisticated, esoteric dishes, but we use very good ingredients," he says. "You'll never find us using imitation sour cream or putting foam in our margaritas. We call ourselves 'gourmet' for that reason."

That desire for quality extends to seeking out tomatillos from Mexico, chilies from the Hatch Valley of New Mexico, and avocados from California. These ingredients go into the typical tacos, burritos, chili rellenos and quesadillas (made with a whole wheat tortilla), as well as such specialties as fajitas (in this case two large, hot soft flour tortillas filled with carne asada, salsa, and lettuce and tomato), and baturillo de legumbres (a wheat tortilla filled with beans, guacamole, sour cream, lettuce, tomato, red chili sauce, and melted cheese). Papagayo also offers a Mexican-oriented salad bar at lunch with Mexican vinaigrette, different kinds of beans, tortilla chips, and Mexican soups.

Schliff also notes the increasing sophistication of the customer. "As the market becomes more sophisticated, we are testing items as specials," he says. "But I think there are some pretty exotic tastes people here are not ready for, like green sauce with tomatillos, or some of the cruder tastes like dried red chilies. And we did unsuccessfully try some nice seafood dishes at Kill Devil Hills, including a ceviche (marinated raw fish) in a flour tortilla with a sauce. Nobody bought them. Maybe in the future."

Up in staid Hartford, Conn., a restaurant called Pancho McGee's has helped popularize Mexican food. Owned by a small chain called The Restaurant Group, Pancho McGee's manages to combine Mexican and barbecue specialities.

"All of a sudden, in two years, we've gone from three Mexican restaurants in the state to over 20," says manager Kevin McGill. "The interest in Mexican food is obvious when you walk through the supermarket—the selection of Mexican foods has doubled in the last few months. People are finding they like the taste, and it's affordable."

McGill affirms that his area is not ready for the more sophisticated Mexican fare, though along with the tacos and burritos Pancho McGee's sells such specialties as pollo de mole, chicken with chocolate and cinnamon sauce. Average check is $10 per person with drinks.

Among chains the market leader continues to be PepsiCo's Taco Bell, with 1,657 units and annual sales estimated at well over $600 million. Other fast feeders in the top 10 Mexican chains are Wyoming-based Taco John with 352 units, Oregon-based Taco Time with 246 units, California-based Del Taco Inc. with 180 units, and Georgia-based Del Taco Corp. (owned by W.R. Grace and a Del Taco Inc. licensee) with 120 units.

Most developments in the field of Mexican fast food reflect fast food trends rather than specifically Mexican trends. For example, Taco Bell is using its advertising to position itself against all other fast food chains rather than against other Mexican restaurants.

Mexican fast food chains are broadening their menus, with Taco Bell adding an extra large taco called Taco Bellgrande, a "light" taco, and nachos. Wichita, Kan.-based Taco Tico, with 110 units, has added chili as well as a dinner plate, and Odessa, Tex.-based Taco Villa has added a Salad Ole served in a deep fried flour tortilla. Taco Time has added nacho delights, tostada delights, the Casita Burrita, and a "Super Natural Taco" served in a whole wheat flour shell and stuffed with beans, meat, sour cream, guacamole, and lettuce.

Del Taco Corp. is now in the process of converting all its units to a

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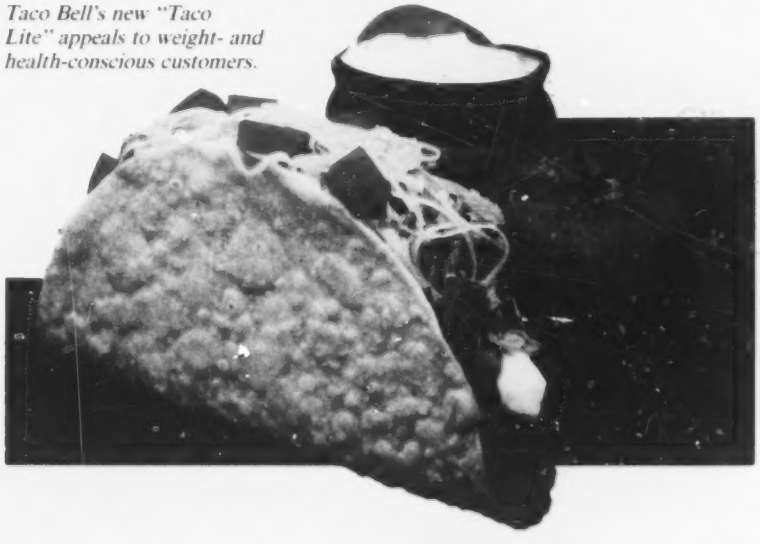
Taco Bell's new "Taco Lite" appeals to weight- and health-conscious customers.



For information circle number 103➔

Colorful drinks complement Acapulco y Los Arcos' menu.

An apple burrito, flan, and deep fried ice cream.

Del Taco Mexican Cafe concept. Karen Eadon, vice-president of marketing, describes the new concept as "still fast food, but similar in atmosphere to a family restaurant, with cacti on every table, tablecloths, ceiling fans, and prints on the walls."

With the decor changes comes a significant expansion of the menu. Dinner platters, with rice and beans, will build evening business, and a Mexican breakfast will be added. Breakfast consists of a soft flour tortilla filled with scrambled eggs, cheese, and red sauce, or eggs with bacon and sausage, for 69 cents; huevos rancheros for 99 cents; and pastry-like empanadas for 49 cents.

"We're after that famous adult fast food customer who wants more than the traditional plastic," says Eadon. "We're trying to do the same thing that Jack In The Box and Carl's Jr. are trying to do. We tested the new concept in 1983, and store volume increases in those stores were significantly higher—probably by about 20 percent."

By far, the largest Mexican dinner house chain is Chi-Chi's, located in 34 states and four Canadian provinces. The chain is beginning its penetration of the Northeast. In the New York metro area, where the Mexican food segment was locked up by independents, the chain now has three units.

Jack Butorac, Chi-Chi's vice-president of systems and administration, says that the chain has seen some changes in what the public wants from a Mexican restaurant, but refuses to comment on the changes. He will say, however, that Chi-Chi's sales for the first six months of fiscal '84 are running 68 percent over the same time last year. Unit sales volumes average $2.7 million.

Another Mexican dinner house beginning to penetrate new areas is El Torito, which is converting Red Coach Grilles in the Northeast to the El Torito concept. The California-based chain is aggressively opening units in Florida and the Midwest, says LeFranc.

El Torito emphasizes the authenticity of its food, says Le Franc, and corporate chefs travel throughout Mexico gathering recipes. The chain makes 100 million tortillas a month from huge company-owned silos filled with corn, and insists on USDA choice beef and aged cheeses.

El Torito's average check is about $5.25, says LeFranc. One specialty is tacos mexicanos, which is a marinated steak broiled and served in a soft corn or flour tortilla with an avocado relish and a pot of beans in a broth, called charro beans. The recipe is originally from Mexico City. Also popular are carne tampiqueña (choice steak stuffed with vegetables and ham, then wrapped in bacon and broiled) and camarones flores (jumbo shrimp wrapped in bacon, deep-fried and served on a bed of rice).

El Torito also operates several upscale Mexican restaurants under a variety of names. Among them are Cano's in Orange County, California, which specializes in seafoods of the Mexican Riviera. Selections include shrimp, snapper in a tomato vegetable sauce, all varieties of shark, and ceviche, the typical marinated raw fish.

Other concepts include La Fiesta, Que Pasa, Who-Song & Larry's Cantina, Las Brisas, Copa de Oro, and Chubasco, all Mexican, as well as the Annie's Santa Fe's, transferred by owner W.R. Grace to El Torito ownership from Gilbert/Robinson Inc.

LeFranc says he believes the popularity of Mexican food has yet to peak. "I compare it to Italian food," he says. "We started with spaghetti palaces and pizza joints, and now people have a much greater appreciation for regional variations and subtleties. Tex-Mex will always be popular because it's fun and there's a very strong price/value relationship, but people will start to appreciate the subtleties."

El Chico Corp. operates 85 units in the South and Southwest, mainly Texas, Oklahoma, and Louisiana. Short-term development plans call for filling out existing markets and going into the Carolinas and Florida, says Huston.

The company recently changed hands, returning to co-founder Gilbert Cuellar, when Campbell-Taggart had to divest after its acquisi-

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For information circle number 104 ➔

tion by Anheuser-Busch. Thus, recent expansion has been slow but is picking up, says Huston. Since the change, he says, sales have been increasing at a rate of 20 percent a year.

Huston says El Chico's menu is unabashedly Tex-Mex, with an average check of about $5.50. The primary market is families.

The company has just introduced fajitas, which are strips of marinated skirt steak served on a sizzling frying pan and topped with sauteed onions and bell peppers.

"The legend is that gringo cowboys gave Mexican cowboys the bad cuts of meat, like skirt steak. The cowboys learned to marinate it, grill it, cut it into thin strips and put it in flour tortillas with pico de gallo," says Huston. "Fajitas are an authentic, little-known Mexican food that has been very popular in Texas the last two years."

Acapulco y Los Arcos, which for now has ceased expansion outside the West Coast, is concentrating on filling in home markets. Marketing vice-president Mathison says the chain will open six new units in '84 and six to eight in '85, all along the coast as far north as Oregon. New York-based Restaurant Associates recently acquired 35 percent of the stock of Acapulco y Los Arcos, though at present no expansion is considered in the New York area. Restaurant Associates is a broad-based, publicly-owned foodservice and hospitality company.

Acapulco y Los Arcos offers an extremely broad menu with entrees in the $4 to $7 range. Seafood dishes include such specialties as Huachinango Veracruzano (Pacific red snapper simmered in a sauce of green peppers, onions, tomatoes, and stuffed green olives with rice and beans for $7.75) and camarones rancheros (Mexican shrimp stew with long hot green chilies). The menu boasts 65 combination plates in addition to a la carte selections, appetizers, salads, seafood specials, and some 22 specialty dishes.

With 32 units, Acapulco y Los Arcos posted 1983 sales of $37.9 million.

Another up-and-coming Mexican dinner house chain, founded in St. Louis by a Mexican immigrant whose first restaurant job was washing dishes, is Casa Gallardo. Now owned by the General Mills Restaurant Group, Casa Gallardo boasts 30 units with estimated sales each of $1.9 million.

Casa Gallardo will open another four units by June 1, with development concentrated in the Southeast and the Midwest, says marketing vice-president Anderson.

The chain recently introduced an expanded menu, with some upgraded items like a steak taco served in a soft flour tortilla with sauce, refried beans, and relish, as well as a burrito machaca (machaca is shredded beef), tamales, and chili con carne. The new menu also includes potato skins and a couple of American items as well as several new desserts, including empanadas.

Average check is $5.95, and the single most popular entree continues to be the chimichanga, which is whole chunks of beef, pork, or chicken in a tortilla shell dressed up with guacamole, sour cream, and

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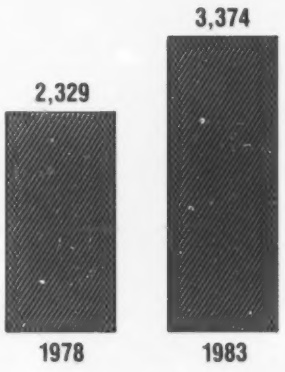
Mexican Franchising

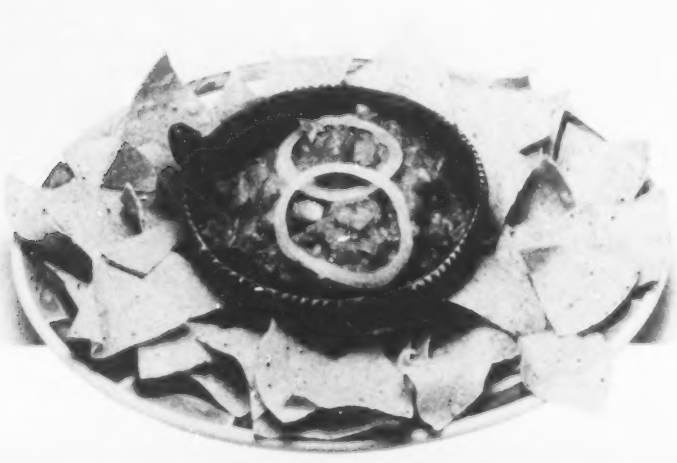
Unit Growth Up 45% (1978-1983)

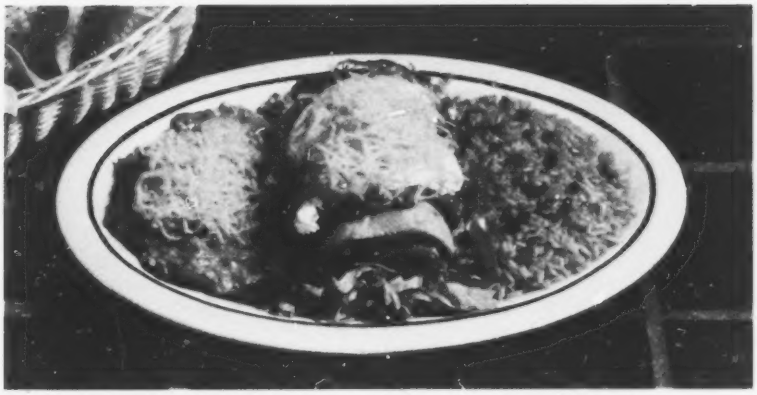


Source: Restaurant Business Magazine, U.S. Dept. of Commerce

At Casa de Pico in San Diego, customers dine under umbrellas.

Guacamole like Pepe's is always a favorite.





Del Taco Corp. has introduced platters to boost evening business.

plenty of cheese.

Anderson says that Casa Gallardo charts customer preferences closely, and he sees a lot of interest in appetizers and finger foods. Therefore, the chain also has added a Mexican pizza and more nachos, and is broadening the a la carte section.

Casa Gallardo is venturing into some markets, such as Huntsville, Ala., and Richmond, Va., where Mexican food is uncommon. The chain is preparing a whole host of promotional variations to educate customers in such markets, says Anderson.

Garcia's of Scottsdale, based in Phoenix, also has 30 units throughout the U.S. from Alaska to Florida. New units are opening in Boise, Idaho; Miami, Coral Springs and Ft. Lauderdale, Fla.; and Northridge, Calif. Expansion has slowed down somewhat from '83, says manager of marketing services Christy Miller, and the chain will now concentrate on a franchising program.

Garcia's was founded about 25 years ago by Julio and Olivia Garcia, and the Sonoran-style menu includes about 100 items. Most popular are pollo fundido (a deep-fried folded flour tortilla filled with seasoned chicken and covered with melted cheese for $6.95), chimichangas, and the tostada del rey. Tostada del rey is chicken or beef in a deep-fried molded tortilla layered with lettuce, sour cream, green onions, jack and cheddar cheese, and machaca beef or seasoned chicken for $6.45.

Miller notes that she is seeing more and more interest in chicken and vegetable dishes, in keeping with the trend to maturing tastes.

She adds that Garcia's seeks the same market as Chi-Chi's and El Torito, though not on the same scale. Prices and average check are in the same range.

Across the country, regional chains such as Casa Bonita and Ninfa's in Texas flourish. One is Chicago-based Pepe's, with 70 units in the metro area.

President Robert Ptak describes the menu as "definitely not Tex-Mex." Entrees include two Mexican stews, guisado de puerco and guisado res, as well as chicken in a mole sauce, chilies rellenos, and menudo. Menudo is a typical stew made with tripe that sells suprisingly well, Ptak says.

He adds that taco dinners are the most popular, followed by enchiladas suizas and tostadas suizas (suizas refers to cheese). But as the public becomes more adventurous, the chain is adding more Mexican soups, including a meatball soup with chunks of vegetables.

Ptak says Pepe's is positioned somewhere between Taco Bell and Chi-Chi's, with emphasis on the family dinner. Though the restaurant offers table service, some 20 percent of sales are take-out.

Another regional chain picking up momentum is Fort Worth-based

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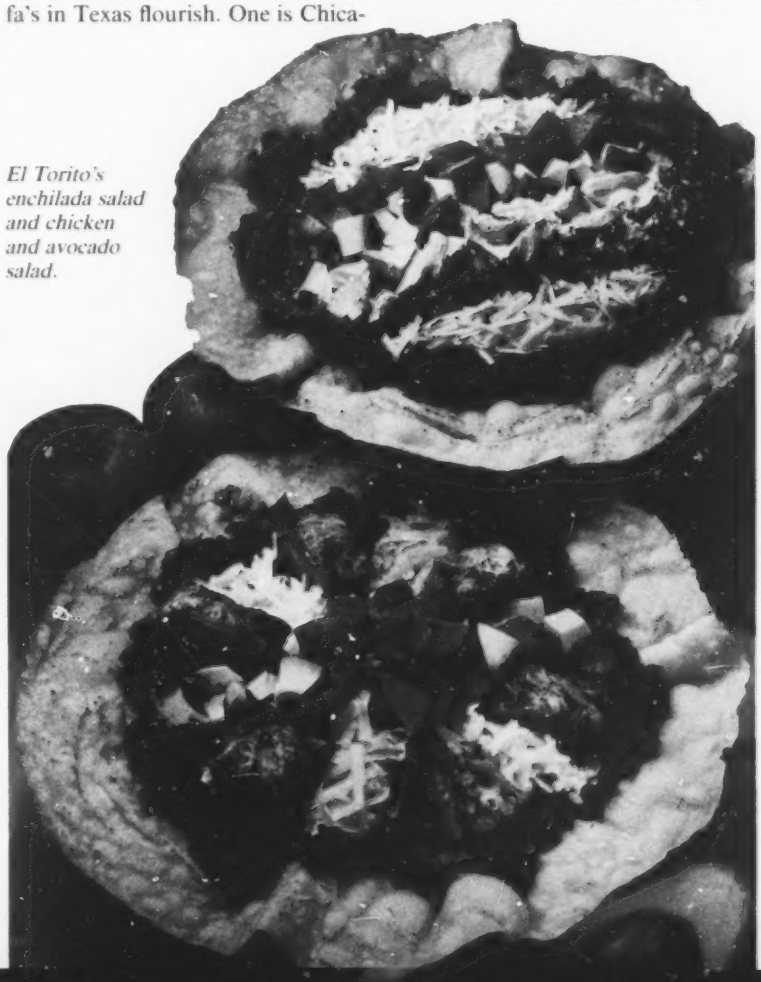
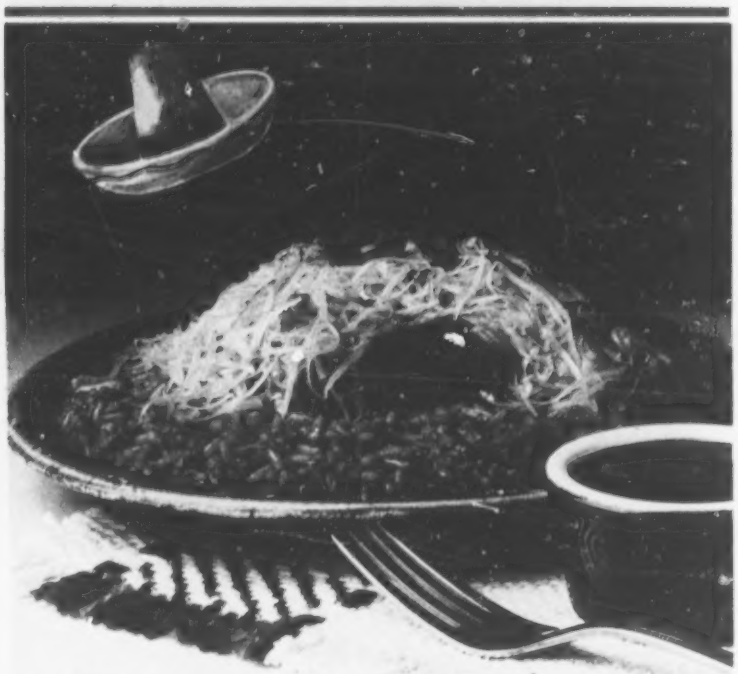


El Torito's enchilada salad and chicken and avocado salad.

Uncle Ben's®
Menu Messages



Chopped Steak Olé

Serving suggestion: UNCLE BEN'S turns this chopped steak into a festive Mexicali meal. Cook UNCLE BEN'S® Fast Cooking Spanish Rice (made with 29 specially blended herbs and seasonings) according to package directions. Broil or grill 6-oz. chopped steak patties. To serve, arrange chopped steak on a bed of hot cooked rice, then top with 1 oz. picante sauce, 1 oz. shredded lettuce and 2 oz. Cheddar cheese. Garnish with diced tomato. One package of UNCLE BEN'S Fast Cooking Spanish Rice makes 24 servings (No. 8 scoop).

How to merchandise: Look for other easy ways to add Mexican zestiness to your menu by adding colored napkins, tablecloths and streamers to give a festive mood.

Approximate Spanish Rice Cost: 14¢ per 4 oz. serving.

To help you merchandise Spanish Rice all year round, UNCLE BEN'S offers free menu clip-ons and table tents in our Mexican Fiesta Kit. Simply write on your letterhead to: Mexican Fiesta Kit...

Uncle Ben's, Inc.

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units in Texas, Arizona, and Louisiana. The company operates 29 Pancho's, three Spanish Galleons, and three Emiliano's, and plans call for adding six restaurants this fiscal year.

The chain closed the '70s in the red, but president Hollis Taylor led a turn-around action that involved closing a number of unprofitable restaurants. Unit volumes are up, and Pancho's has commissioned blueprints for two new styles of restaurants. Older units are being remodeled.

It's only fair to note that Mexican mania hasn't spelled total success for everyone. Diversifoods (until recently Chart House) is converting its Cisco's units, and Kentucky Fried Chicken's Zantigo's are more or less in limbo right now.

For the moment, the Mexican food segment is a foodservice success story. "Even in Texas, where Mexican food is a way of life, there's room for more growth," notes Del Taco's Eadon. □

Steak Picado, Vista del Mar, and the tostada at Acapulco y Los Arcos.